

## Procedure for transferring a Pre-Cataloged item to a bib record

Find a bib that matches your item... if you know the item in hand was added as a PRECAT, you can skip the following note and screen print and go to Open Item Status... step (\*).

... if you do not know that the item in hand was added as a PRECAT when adding the barcode in the Holdings Editor tab you'll get a red note below the barcode that states "Duplicate Barcode"

The screenshot shows the 'Holdings Editor' tab in a web browser. The 'Record Summary' section displays the following information:

Title:	Dog diaries : a middle school story	Edition:	First North American edition.	TCN:	on1044562988	Created By:	alim
Author:	Patterson, James 1947-	Pub Date:	2018	Database ID:	2038123	Last Edited By:	hspry
Bib Call #:	[Fic]	Record Owner:		Last Edited On:	4/30/2019 2:19 PM		

Below the summary, there are buttons for 'Edit', 'Item Templates', and 'Defaults'. A 'Batch Apply' section is visible with an 'Apply' button. The main table shows the following row:

Owning Library	Call Numbers	Classification	Prefix	Call Number Label	Suffix	Items	Barcode	Item #	Part
UM-SPL	1	Dewey (DDC)		JUV FIC PAT		1	37875000136152		

A red error message 'Duplicate Barcode' is displayed below the barcode field, which is circled in pink. At the bottom, there is a 'Template' section with 'STAN - J F' and an 'Apply' button.

\*Open Item Status in a new tab and input the barcode:

The screenshot shows the 'Item Status' tab in a web browser. The 'Scan Item' section has a search bar and a 'Submit' button. Below it, the 'Item Status' section displays a table with the following data:

#	Status	Age-Based	Barcode	Call Number	Location	Due Date	Item Status	Title	Alerts	Price
1	✓		37875000136152	PRECAT	Stacks	5/25/2021	Checked ...	dog diaries: a middle school story	0 ..Manage	

At the bottom right, there is a 'Print' button.

Go back to Holdings Editor tab & Close it (Leave site? > Leave) [if you had one open, top of page]

Go to "Holdings View" in record tab and right click on Library (or use Actions menu) > **Add Call Numbers**

The screenshot shows the 'Record Summary' page for 'Dog diaries : a middle school story'. The 'Holdings View' tab is selected. A table lists holdings, with the first row for 'UMCTY' selected. A context menu is open over this row, listing various actions. The 'Add Call Numbers' option is highlighted with a pink circle.

#	Owning Library	Call Number	Parts	Location	Item #	Barcode	Status	Alerts
1	UMCTY							0 Manage

- Triggered Events
- Item Holds
- Print Labels
- Mark**
- Item as Damaged
- Item as Discard/Weed
- Item as Missing
- Library/Call Number as Transfer Destination
- Add**
- Add Call Numbers**
- Add Items
- Add Call Numbers and Items
- Add Item Alerts
- Edit**
- Edit Call Numbers
- Edit Items

... add call number, then "Save & Exit"

The screenshot shows the 'Batch Apply' form for adding call numbers. The 'Call Number Label' field is highlighted with a pink circle. The form includes fields for 'Owning Library', 'Call Numbers', 'Classification', 'Prefix', 'Call Number Label', and 'Suffix'. A 'Save & Exit' button is visible.

Owning Library	Call Numbers	Classification	Prefix	Call Number Label	Suffix
UM-SPL	1	Dewey (DDC)		JUV FIC PAT	

Buttons: Edit, Item Templates, Defaults, Batch Apply, Apply, Save & Exit, Add call number

... Right click on Library/Call # > **Mark...** Library/Call Number as Title Destination

The screenshot shows a web browser window displaying a library catalog record for 'Dog diaries : a middle school story'. The record summary includes fields for Title, Edition, TCN, Created By, Author, Pub Date, Database ID, Last Edited By, Bib Call #, Record Owner, and Last Edited On. Below the summary are navigation buttons and view options. A table lists holdings, with the first row selected. A context menu is open over the first row, listing various actions. The option 'Library/Call Number as Transfer Destination' is circled in pink.

#	Owning Library	Call Number	Parts	Location	Item #	Barcode	Status	Alerts
1	UMCTY ... UM-SPL	JUV FIC PAT						0 <a href="#">Manage</a>

- Request Items
- Link as Conjoined to Previously Marked Bib Record
- Show
- Item Status (list)
- Item Status (detail)
- Triggered Events
- Item Holds
- Print Labels
- Mark
- Item as Damaged
- Item as Discard/Weard
- Item as Missing
- Library/Call Number as Transfer Destination**
- Add
- Add Call Numbers
- Add Items
- Add Call Numbers and Items

You should see green note (bottom right corner) pop up briefly that states "Holdings transfer target set"

The screenshot shows the same library catalog record page as above. A green notification box is visible in the bottom right corner, containing the text 'Holdings transfer target set'. The notification box is circled in pink.

Holdings transfer target set

Go back to Item Status tab...

... right click the PRECAT item & select **Transfer** [last section] ... Items to Previously Marked Call Number

The screenshot shows the 'Scan Item' interface. At the top, there is a search bar and navigation tabs. Below, a table lists items. The first item is selected, and a context menu is displayed with the following options: Item as Damaged, Item as Discard/Weed, Item as Missing, Add, Items, Call Numbers and Items, Item Alerts, Edit, Call Numbers, Items, Call Numbers and Items, Replace Barcodes, Manage Item Alerts, **Transfer**, Items to Previously Marked Call Number, and Items to Previously Marked Call Number. The 'Transfer' option and its sub-item are circled in pink.

Go back to record tab... and refresh (either by using “reload this page” circular arrow at top of browser - or- clicking on a different tab in bib such as “Monograph Parts” and clicking back to “Holdings View”) to refresh the information to show the transfer

The screenshot shows the 'Record Summary' page. The 'Holdings View' tab is selected. Below the summary, there are navigation buttons and a table of holdings. The table has the following columns: #, Owing Library, Call Number, Parts, Location, Item #, Barcode, Status, and Alerts. The first row shows a holding with the following details: # 1, Owing Library UMCTY ... UM-SPL, Call Number JUV FIC PAT, Location Stacks, Item # 37875000136152, Barcode 37875000136152, Status Checked..., and Alerts 0.

Select the line (double clicking or select and Actions menu > **Edit** Call Numbers and Items) to open a Holdings Editor tab

Edit your item utilizing appropriate template (be sure to adjust **Status** if necessary, will probably be **Cataloging** when transferred)

Save & Exit – PRECAT transfer completed